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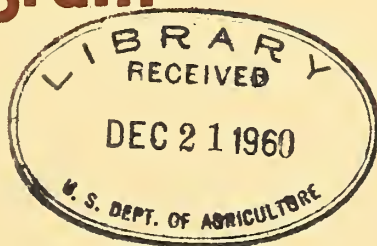
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A249.3
F762B

Forest Service

BUSINESS MANAGEMENT

Training and Development Program



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GS-5/7

Individual Development Plan for

NAME

UNIT

BEGINNING DATE

DATE COMPLETED

NAME OF RESPONSIBLE SUPERVISOR OR TRAINER

75-2143
I N T R O D U C T I O N

Purpose

Two major purposes of the Business Management Training & Development Program stand out:

1. The individuals participating are assured maximum and directed opportunities for development.
2. The Forest Service makes certain that a sufficient number and kind of business management personnel are available to staff the present and future responsible business management positions throughout the organization.

Objectives

Related objectives are:

1. To plan for and provide basic orientation and initial training to assure the most effective performance of each man in his position.
2. To have all business management executive positions backed up by highly capable employees who are being developed systematically for these positions.

Direction and Guidance

The guidance and training will be under the general direction of the Business Management Staff Officer (Administrative Officer, GS-11 and 12, or Administrative Assistant, GS-9) on the National Forest Unit or Experiment Station to which the trainee is assigned. Assistance in counseling and guidance of the trainee would also be provided by the Forest Supervisor and Resource Staff Officers. In addition,

the Development Plan provides for certain phases of instruction, orientation, guidance and counseling by Regional Office Staff.

Although the "career development" and "working knowledge" phases of the program are somewhat inter-related, yet these dual-objective phases of the development plan should be kept clearly in mind throughout the progress of the training course.

The "career development" aspects will relate primarily to the training program phases covered under the major subject headings of "Orientation," "Elements of Forest Service Management" and "General Administration," as hereinafter listed. In this area, emphasis should be placed - through study and counseling - on the elements of management as applied to Forest Service work. These include: the Forest Service objectives and program; organization and delegated authority; internal audit, inspection and internal controls; Forest Service policies; planning and coordination; basic Forest Service laws; and Forest Service history.

The "working knowledge" phases of the development plan will largely be accomplished through working assignments coordinated with assigned study of related manual and handbook material. This will involve working under a planned schedule with the various clerks in the Supervisor's office. During this phase, emphasis should be placed on the objective of acquiring a working knowledge of office procedures and paper work activities generally. It is not the objective here to have the trainee acquire any particular degree of proficiency in the performance of clerical tasks. His working knowledge of clerical procedures, combined with the knowledge of related instructions acquired through study, is essential to his performance as Administrative Assistant, GS-7. Some reading of reference material on the trainee's own time will help speed the training process.

Counseling

A review discussion between the Counselor and Trainee at frequent intervals of at least one week is a most important element of the training procedure. By this means the Counselor can (1) determine the extent of absorption of the subject; (2) relate the particular subject matter to the over-all picture; and (3) enhance the career development phase of the training.

Control

The first step is to prepare the individual training plan for use in guiding the development of the trainee. The plan should be prepared on the attached forms with the objective of scheduling as many of the subjects as possible. Emergencies or other valid circumstances might prevent the full scheduling of all subjects. In such case, priorities shall be set and the most vital subjects covered. Estimated hours for each major category have been indicated on the form as a guide in pre-scheduling the dates and hours of planned assignments. The planned dates should account for calendar work days for a six-month period running from the date of trainee assignment (but not necessarily in the order of the outline). The objective is to complete the initial cycle of training in a six months' period at which time a new plan will be prepared with emphasis given to assignments involving administrative, supervisory and affecting negotiation ability and involving interpretation of policies, regulations and law.

Review of initial training phase will be given as necessary. Such review, subject and timing should be based on the judgment

of the counselor and full recognition of the expressed analysis of the trainee as to his progress in each area.

In order to set the stage for more detailed study, it is desirable that the program be started in the "orientation" category - followed by the subjects listed for the "Elements of Forest Service Management."

Three copies of the training plan should be prepared -- one for the trainee; one for the counselor; and one for the Division of Personnel Management. The latter should be sent to Personnel Management as soon as the plan is worked up. Upon completion of the scheduled training, the counselor's (completed) copy should be sent the Division of Personnel Management where it will be incorporated in the trainee's personnel folder. The trainee's copy should be taken by him to his unit of first working assignment and should serve as a guide for follow-up training.

Upon completion of each assigned subject (A-1, A-2, C-6, etc.) the plan should be annotated to show the date of completion, date of review and counseling and the initials of the counselor.

Upon completion of each major phase of the development plan (as noted in the subject-matter outline) the trainee will prepare a written report (not to exceed one page - single spaced) giving his own appraisal of the work and study assignments in which he has participated. These reports will be attached to, and become a part of the completed copy of the training plan which is filed in the Personnel Management personnel folder.

At the end of the third and sixth months of training, a narrative appraisal report in duplicate should be submitted to Personnel Management by the Forest. This report should cover points such as attitude and interest, mental alertness, initiative, writing ability, personality and human relations and a size-up of the trainee as to career potential.

At the completion of the training assignment, a "Summary Progress Rating" will be prepared on forms provided for this purpose. Coincident with the preparation of the final probationary report, there will also be prepared a "Performance Appraisal and Evaluation of Potential" report for each trainee recommended for permanent appointment. A supply of forms is provided for this purpose. This form will be prepared in triplicate. Two copies of each report will be submitted to the Regional Personnel Officer who, in turn, will forward one copy to the Washington Office.

TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		COMPLETED	PRO-FICIENCY			REVIEW AND COUNSEL DATE - INITIALS (2)
		PLANNED			(1)			
		HRS.	DATE		A	B	C	
<u>A - Orientation</u> (Approx. 40 Hours)								
1. Read "Breaking New Ground" G. Pinchot, and submit brief book review.	Library Book							
2. Read "The Work of the Forest Service," and submit brief book review.	Bulletin No. 91							
3. Read "The Forester on the Job" - McCulloch, OSC Cooperative Association, Cornwallis, Oregon, and submit brief book review.	Library Book							
4. Counsel on the important responsibilities of the trainee on-the-job, and in self-development, and a full explanation of this training plan.	Counselor							
5. Equipped with a forest map and forest fact sheet, trainee will travel with the Counselor to selected ranger districts on the forest and become generally familiar with the forest layout, its activities and programs, and become acquainted with the rangers and some district personnel.	Map and Fact Sheet							
6. Study forest organization chart and meet forest supervisor and staff.	Chart and Counselor							
7. Trainee's appraisal report on the "Orientation" phase.								

1) A-Commendable; B-Adequate; C-Inadequate

2) Initials of Individual who served as Supervisor-Trainer.

TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		PRO-FICIENCY	REVIEW AND COUNSEL DATE - INITIALS (2)		
		PLANNED					COMPLETED
		HRS.	DATE				
<u>B - Elements of Forest Service Management</u> (Approx. 40 Hrs.)							
1. Forest Service objectives and program.	GA-C1, C4-16 and Supervisor						
2. Counsel on the principles and responsibilities of the Forest Service in public service aspects of community, county, state, regional and national welfare.	Supervisor and Counselor						
3. Counseling on the major part the business management job plays in the over-all Forest Service management program.	Counselor						
4. Principles of Forest Service organization and delegation.	Counselor & Org. Chart						
5. Work load analysis and planning.	GA-C4, 12, 16						
6. Review of basic Forest Service laws and regulations.	GA-A						
7. Inspection and Internal Audit as a control devise.	GA-D & Int.Audit Hdbk.						
8. Become acquainted with the principles and format of the Forest Service Issuances System (Manuals, Handbooks, etc.).	F.S. Manuals, Handbooks, Circulars						
9. Financial Management.	GA-F						

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		COMPLETED	PRO- FICIENCY			REVIEW AND COUNSEL DATE - INITIALS (2)
		PLANNED			(1)			
		HRS.	DATE	A	B	C		
B - <u>Elements of Forest Service Management</u> (Approximately 40 Hrs.) (Continued)								
10. Trainee's appraisal report on "Forest Service Management" phase.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		PRO-FICIENCY	REVIEW AND COUNSEL		
		PLANNED	COMPLETED		DATE - INITIALS	(2)	
		HRS.					DATE
(1)							
A B C							
C-Accounting and Fiscal Management (Approx.240 Hrs)							
1. Study fiscal objectives, functions & responsibilities.	FC-A						
2. Study appropriation classes, symbols and instructions on availability and use.	FC-B						
3. Study Forest Service accounting system. Become familiar with accounting control responsibilities, and system, account definitions, functional definitions, coding, etc.	FC-D & H						
4. Prepare obligation report.	FC-D3-2d & FC-D3-7b						
5. Prepare travel authorizations.	FC-C						
6. Study employee bonds.	FC-E						
7. Work with Voucher Clerk.	FC-M						
a. Audit & check invoices (All classes).	FC-M						
b. Relate payment transactions to service, supply and construction contracts.	FC-M						
c. Prepare appropriation and functional work sheet, preparatory to scheduling.	FC-M						

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED		DATES		PRO-FICIENCY			REVIEW AND COUNSEL DATE - INITIALS (2)
		PLANNED		COMPLETED		(1)			
		HRS.	DATE			A	B	C	
<u>C-Accounting and Fiscal Management (Approx.240 Hrs.)</u> (Continued)									
7. d. Prepare and audit travel accounts.	FC-L & FC-M4								
e. Assist on direct settlement claim.	FC-M11								
f. Prepare adv. order and vouchers.	FC-M5								
g. Prepare and process refund vouchers.	FC-M7								
h. Prepare and process SF-1081 vouchers.	FC-M9								
i. Study regulation on Government checks.	FC-M12								
j. Prepare and process adjustment vouchers.	FC-M13								
k. Study imprest cash fund.	FC-M15								
l. Prepare equipment rental report.	GA-H FC-D								
8. Assist in property damage claim; share in on-the-ground investigation, report preparation, etc.	FC-N								
9. Study Cooperative Work laws and regulations.	FC-Q and Sec.5 G-T Act (GA-A 1-16)								
a. Review drafts of local agreements.									
b. Draft agreement for a current project.									

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		COMPLETED	PRO-FICIENCY			REVIEW AND COUNSEL DATE - INITIALS (2)
		PLANNED			(1)			
		HRS.	DATE			A	B	
C-Accounting and Fiscal Management (Approx.240 Hrs) (Continued)								
10. Study special authorizations and limitations.	FC-R							
11. Study Internal Audit Handbook.	Int.Audit Handbook							
a. Participate in ranger district audit.								
b. Under direction, make one district audit.								
c. Participate in permittee audit.								
d. Make one permittee audit.								
12. Become familiar with cost accounting system - prepare journal vouchers.	FC-F3							
13. Trainee's appraisal report on "Accounting and Fiscal" phase.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		PRO-FICIENCY	REVIEW AND COUNSEL DATE - INITIALS (2)		
		PLANNED					
		HRS.	DATE	(1) A	B	C	
<u>D - Property & Supply</u> (Approx. 80 Hrs.)							
1. Procurement Management, including integration of budgets and procurement plans, systematic procurement planning and relationship to work project plans and contract supervision.	GA-H						
2. Work with Purchasing Clerk.	GA-H;C5						
a. Prepare purchase orders from requisitions.	(Chapt. A&P)						
b. Contract review and prepare supply and service bids and construction contract.	(Chapt. C&E)						
c. Working at warehouse or receiving point.	(Chapt. F&G)						
d. Study uniform regulations.	(Chapt.D)						
e. Study printing authority and regulations.	(Chapt.H)						
f. Prepare bills of lading.	(GA-H; Ch.8)						
g. Become familiar with mandatory contracts, GSA catalogs, etc.							
3. Check contract award and review contract administration.	Selected Contracts						

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		PLANNED			(1)	A	B	
		HRS.	DATE					
<u>D-Property & Supply (Approx. 80 Hrs.) (Continued)</u>								
4. Review fire equipment agreements, study application with ranger.	Selected Agreements							
5. Study property management and work with Property Management Officer and Property Accountability Clerk.	GA-H; Ch. 6							
a. Post property transactions.	FC-G							
b. Assist in taking and reconciling physical inventory.								
c. Assist in reconciliations of property records with general ledger control.								
d. Prepare property JV's.								
e. Prepare property transfer and disposal documents.								
f. Prepare lease papers.	GA-G4							
6. Study real property management instruction and prepare space utilization report.	GA-G; Ch. 10							
7. Study Forest Service residence occupancy policy and instructions. Review several quarter's appraisals.	GA-G; Ch. 11							

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		COMPLETED	PRO- FICIENCY			REVIEW AND COUNSEL
		PLANNED			(1)			DATE - INITIALS
		HRS.	DATE		A	B	C	(2)
<u>D-Property & Supply (Approx. 80 Hrs.) (Continued)</u>								
8. Meet selected local people with whom purchasing business is transacted.								
9. Trainee's appraisal report on the "Property & Supply" phase.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		PRO-FICIENCY	REVIEW AND COUNSEL		
		PLANNED			COMPLETED	(1)*	DATE - INITIALS (2)
		HRS.	DATE				
<u>E - Personnel & Payroll</u> (Approx. 120 Hrs.)							
1. Study Personnel Regulations with emphasis on sections of Recruitment, Employment, Appointments, Promotion and Placement, Classification, Wage scales, Hours of Work, Efficiency Ratings, Rules of Conduct, Discipline and Control, Awards Program, Training, Employee Relations, and Safety and Health.	GA-E						
2. Learn principles of time recording and reporting.	FC-M2						
3. Work with Personnel Payroll Clerk.							
a. Prepare papers request- ing appointment.	Counselor						
b. Receive application and prepare Schedule A appointment.	Forest instructions						
c. Audit and check time reports - study Payroll instructions.	FC-M12 & FC-M2, a&b						
d. Check and post leave - study Sick and Annual leave regulations.	FC-J						
e. Study fire time-keeper's handbook.	Handbook						
f. Learn differential pay system.	RO Instr.						

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES			PRO- FICIENCY			REVIEW AND COUNSEL DATE - INITIALS (2)
		PLANNED		COMPLE TED	(1)			
		HRS.	DATE		A	B	C	
<u>E - Personnel & Payroll</u> (Approx. 120 Hrs.) (Continued)								
3. g. Compute salary charge under cooperative agreement, such as scaling.	Applicable Agreement							
4. Study compensation for injury regulations; prepare and process C A Forms.	FC-0							
5. Study the forest's training objectives and program.								
6. Participate in an office safety inspection.	Safety Code							
7. Trainee's appraisal report on the "Personnel and Payroll" phase.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		COMPLETED	PRO-FICIENCY			REVIEW AND COUNSEL DATE - INITIALS (2)
		PLANNED			A	(1) B	C	
		HRS.	DATE					
F - Resource Activities (Approx. 160 Hrs.)								
1. Study collection instructions.	FC-H							
2. Become familiar with Timber Management Regulations, policy and instructions.	NF-B							
3. Work with a field man on a trip, observe and discuss multiple resource use activities, including plans and action.								
4. Work with Resource Clerk.								
a. Study timber sale contract forms.								
b. Audit cutting reports and scale books.								
c. Prepare timber collection statements.								
d. Post timber sale card records, both cut and deposits.								
e. Study payment bond procedure and handle related transactions.								
f. Help prepare quarterly cut and sold report and related work sheets								
g. Prepare JV for earned and unearned timber deposit funds.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		PRO-FICIENCY	REVIEW AND COUNSEL		
		PLANNED	COMPLETED		DATE - INITIALS		
		HRS.	DATE			(1) A B C	(2)
F - Resource Activities (Approx. 160 Hrs.) (Continued)							
5. Become familiar with Range Management Regulations, Policy and Instructions, with emphasis on Chapters 1, 2, 3, 4, & 5.	NF-C						
6. Work with resource clerk.							
a. Study grazing permit forms and help prepare permits.							
b. Help compute grazing fees.	NF-C, Ch.5						
c. Post grazing cards, both approved applications and payments.							
d. Help prepare annual grazing statistical report.							
7. Become familiar with Special Land Use regulations, policy and instructions.	NF-H						
8. Work with resource clerk.							
a. Prepare Special Use Permit, using Manual to check clauses.	NF-H						
b. Prepare Special Use Lt's.							
c. Post use card records where in use.							

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		PLANNED			(1)	DATE - INITIALS		
		HRS	DATE				A	B
F - Resource Activities (Approx. 160 Hrs.) (Continued)								
8. d. Help prepare annual statistical uses report.								
9. Become familiar with Wildlife objective and policies.	NF-D							
10. Become familiar with recreation objectives and policy.	NF-G							
11. Become familiar with trespass regulations and policy.	NF-M							
12. Review trespass reports and action.								
13. Trainee's appraisal report on the "Resource" phase.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		PRO-FICIENCY	REVIEW AND COUNSEL DATE - INITIALS (2)		
		PLANNED					COMPLETED
		HRS.	DATE		(1) A B C		
<u>G-Budgeting and Finance (Approximately 80 Hrs.)</u>							
1. Study Finance and Financial planning instructions.	GA-F						
a. Study project work order system and its relationship to financial planning.							
b. Help work up or maintain forest operating plan.							
c. Assist in preparation of Form 44.							
d. Prepare ranger district financial statement.							
e. Help prepare forest and ranger district budget for a subsequent year.							
f. Compute a national forest administrative and business management work-load analysis and distribute "General Expenses" budget for a subsequent year.		Adm. and Business Mgt. Sec. of Correlated Standards.					
g. Prepare special financial report, as called for.							
h. Prepare forms 540A.							
2. Trainee's appraisal report on the "Budget & Finance" phase.							

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES		COMPLETED	PRO-FICIENCY			REVIEW AND COUNSEL	
		PLANNED			(1)	A	B	C	DATE - INITIALS
		HRS.	DATE						(2)
<u>H - General Administration</u> (Approx. 280 Hrs.)									
1. Forest Service correspondence.	GA-I								
2. Initiate several letters on variety of subjects.									
3. Understand and apply: Principles of courtesy, clarity, conciseness, completeness and correctness.									
4. Records Management.									
5. Mail, telegraph, radio and telephone.									
6. Assist in filing and study filing system; also records disposition.									
7. Participate in forest staff meeting.									
8. Participate in ranger and/or fire guard meeting.									
9. Detail to ranger district for at least two weeks' work with ranger in field and clerk in office - (not later than second month).									
10. Study Information & Education objectives and instructions and prepare news release on assigned subject.	GA-J								

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		PLANNED			A	(1) B	C	
		HRS.	DATE					
H - General Administration (Approx. 280 Hrs.) (Continued)								
11.Study Fire Control objectives and instructions.	NF-A							
12.Detail to project fire as timekeeper.	Fire Tkpr. Hdbk.							
13.Detail to Regional Office after 2-3 months of forest training experience.								
14.Study transportation plan and become familiar with laws, regulations and policy relating to forest transportation system.	NF-K							
15.Accompany forest staff man on short trip to gain on-the-ground knowledge of resource work.	NF-K							
16.Become familiar with promise card system and control features.								
17.Become familiar with schedule of reports.								
18.Insert Manual and Handbook revisions.								
19.Read "Administrative Action" - Wm.H.Newsman, and submit book review.								
20.Read two issues of "The Internal Auditor" - Institute of Internal Auditors.								

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TRAINING NEEDS	TRAINING METHOD OR STUDY REFERENCE	SCHEDULED DATES			PRO-FICIENCY			REIVEW AND COUNSEL DATE - INITIALS (2)
		PLANNED		COMPLETED	A	(1)		
		HRS.	DATE			B	C	
<u>H-General Administration</u> (Approx. 280 Hrs.) (Continued)								
21.Read two issues of "The Management Review" - Society for Advancement of Management.								
22.Read "Guide Posts for Supervisors" - USDA release.								
23.Detail to Research, or Branch Center.								
24.Read "Getting Your Ideas Across Thru Writing" - U. S. Dept. Health, Education & Welfare Bulletin #7								
25.Prepare and give a short, oral report on an assigned topic at a staff meeting.								
26.Trainee's appraisal report on the General Administration phase.								

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